

# InfoEd Proposal Routing

Creighton University  
Sponsored Program Administration

March 2022

Creighton  
UNIVERSITY

# Why we route?

Your signature indicates review of the proposal; confirmation that it is consistent with departmental, college, or university mission, practice, and priorities; and approval of all commitments described in the proposal, including those involving space, equipment, personnel, release time, cost sharing, and conflict of interest.

# How does routing work?

Proposal P2100243 - Investigator Creighton "Routing Practice" (Under development)

Refresh Route

Route Path - Internal Programs Add New Person to Review Path		
Step 1	PI	Investigator Creighton
Inserted Step	Inserted Step	Department Administrator Creighton
Step 5	SPA Approval	Barbara Bittner
	SPA Approval	Jennifer Klimowicz
	SPA Approval	Elizabeth Herr
Step 6	Department(s)	Chair Creighton
Step 7	School(s)	Dean Creighton
Step 8	Provost Approval	Provost Creighton
Step 18	Completion, other	Elizabeth Herr
	Completion, other	Barbara Bittner
	Completion, other	Investigator Creighton
	Completion, other	Jennifer Klimowicz

1. Investigator must approve

2. Department Administrator must approve

3. Sponsored Programs Reviews Proposal (only one needs to approve)

4. Department Chair must approve

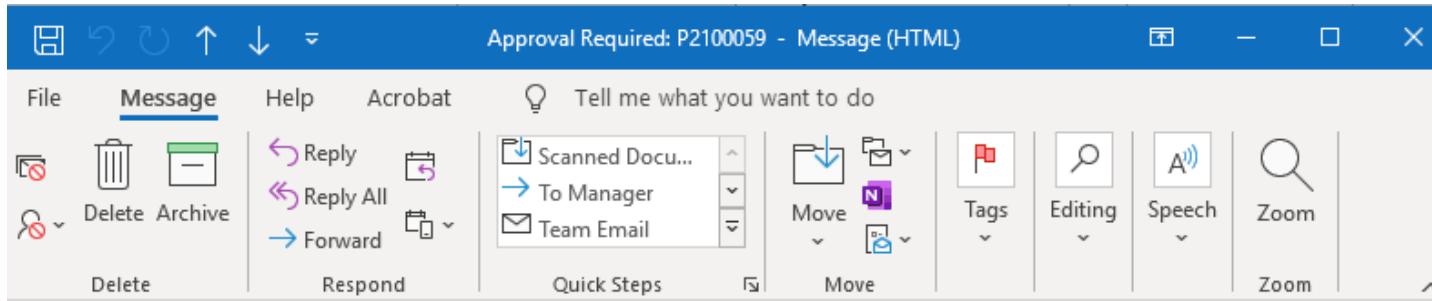
5. School/College Dean must approve

6. Provost must approve

7. Investigator and SPA are **informed** that routing has been completed (no additional approval needed)

# Email Notification

If a grant proposal is submitted that requires your approval, you will receive an email from [spa@creighton.edu](mailto:spa@creighton.edu).



Approval Required: P2100059



Creighton, SPA <[spa@creighton.edu](mailto:spa@creighton.edu)>  
To Klimowicz, Jennifer R

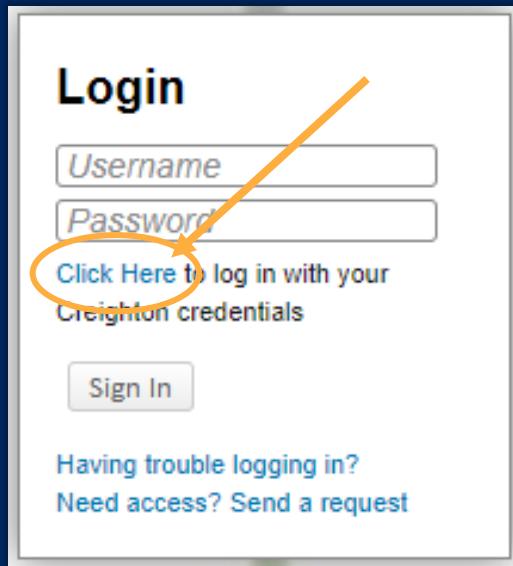
[Reply](#) [Reply All](#) [Forward](#) [...](#)

Fri 7/17/2020 4:26 PM

Investigator Creighton of Test Department is preparing proposal P2100059, Bittner LB692 Test 7.17.2020. Please review the item from here: [Reviewer Dashboard](#). Please note that this proposal is due TO THE SPONSOR by 30-Jul-2020. Any questions should be directed to Sponsored Programs Administration. Thank you.

Click Here to Access Reviewer Dashboard

# If prompted, log into InfoEd



**\*\*\*If you use single sign-on, you do not need to type username and password on this page.\*\*\***

Click on "Click Here to log in with your Creighton credentials." You will be sent to the Creighton University login page. Enter your NetID and password when prompted.



Welcome BLUE\jrk22926

For security reasons, we require additional information to verify your account

Creighton UNIVERSITY ≡ Settings

Remember me for 24 hours

© 2013 Microsoft

# Messages Queue in InfoEd

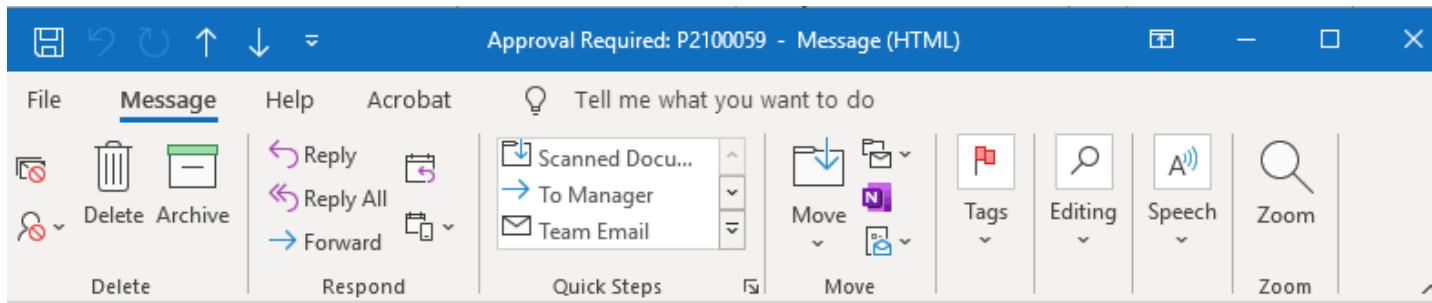
If you did not receive an email from [spa@creighton.edu](mailto:spa@creighton.edu) asking you to approve an InfoEd proposal, you can access the message in the Messages queue in the InfoEd portal.

The screenshot shows the Creighton University InfoEd portal interface. At the top, there is a navigation bar with links for Home, My Profile, Locate My Records, Locate Records, Calendar, Messages (which is highlighted with a yellow circle), and Assignments. To the right of the navigation bar are links for v13 Portal, Module Admin, Welcome Barbara Bittner, and Logout. On the left, there is a sidebar with links for Sponsored Projects, Award Tracking, Financial Tracking, Human Protocol, Env Health and Safety, Conflict of Interest, and SPIN. The main content area is titled "Messages" and has tabs for Inbox (selected) and New Mail. It displays a list of messages with columns for subject, recipient, date, and a checkbox. A message titled "Approval Required: P2200386" is highlighted with a yellow circle and an arrow pointing to it from the text "Click here to open the message." A large yellow box surrounds the entire message list area with the text "Click here to access your messages." at the top right.

Subject	Recipient	Date	Action
Submitted to Sponsor Date Check	Bittner, Barbara	Thu 07-Jul-2022 02:24 AM	<input type="checkbox"/>
Proposal approved for submission: P2200386	Creighton, SPA	Wed 06-Jul-2022 08:33 AM	<input type="checkbox"/>
Proposal Status Report	Herr, Beth	Wed 06-Jul-2022 06:13 AM	<input type="checkbox"/>
Outstanding Approvals			<input type="checkbox"/>
Approval Required: P2200386			<input type="checkbox"/>
Proposal approved for submission: P2200378	Creighton, SPA	Tue 05-Jul-2022 11:03 AM	<input type="checkbox"/>
Proposal approved for submission: P2200358	Herr, Beth	Tue 05-Jul-2022 06:13 AM	<input type="checkbox"/>
Proposal Status Report	Bittner, Barbara	Tue 05-Jul-2022 05:24 AM	<input type="checkbox"/>
Check PT Awarded Dates	Creighton, SPA	Mon 04-Jul-2022 17:03 PM	<input type="checkbox"/>
Approval Required: P2200378			<input type="checkbox"/>

# Messages

The message will look the same as the email referenced above.



Approval Required: P2100059



Creighton, SPA <spa@creighton.edu>  
To Klimowicz, Jennifer R

[Reply](#) [Reply All](#) [Forward](#) [...](#)

Fri 7/17/2020 4:26 PM

Investigator Creighton of Test Department is preparing proposal P2100059, Bittner LB692 Test 7.17.2020. Please review the item from here: [Reviewer Dashboard](#). Please note that this proposal is due TO THE SPONSOR by 30-Jul-2020. Any questions should be directed to Sponsored Programs Administration. Thank you.

Click Here to Access Reviewer Dashboard

# Reviewer Dashboard

Click on Yellow Review tab

You have been identified as someone who needs to perform an On-line Review.  
The "Review Dashboard" allows you to:

- "See Comments" others have made when they reviewed this item
- "Add Comments" to this item
- Indicate "Your Decision" on the Review of this item  
See the "Routing Progress" that this item has/will take

Many of the items being reviewed have deadlines, so please act accordingly. In order to access this information, you will need to be logged in. If you are unsure of your username/password please click [here](#).

1. Review the items listed on the "Review" tab, marking each item "Reviewed" when you have completed your review of it. Note that "Not Applicable" may be an option and if so, you may select that instead of "Reviewed" when appropriate. No item can be left "Un-Reviewed" to continue.  
2. Add any comments to the PI, reviewers, administrators or all viewers as appropriate and click the SAVE icon.  
3. Select a value in the "Decision" menu. You may be prompted to acknowledge specific representations and certifications. You must "Accept" these in order to proceed if presented. Click the SAVE icon to confirm your decision and complete your review.

If you intend to "Add Comments", you should do so before you set your decision. Once you set your decision and save, you will not be able make any additional changes, i.e. "Adding Comments" or changing "My Decision" after your decision is saved.  
If you have any questions regarding your involvement in this process, or what is expected of you please contact:

SPA Creighton   
2500 California Plaza  
Omaha, NE 68178-0390

# Review Proposal Documents

The screenshot shows a proposal review interface with the following components:

- Left Sidebar:** A vertical sidebar with three buttons: **HELP** (red), **REVIEW** (orange), and **ROUTE** (green).
- Proposal Details:** A section titled "Proposal - Initial Application" with the following information:
  - Number: P2100213
  - Title: Haddix Test 8.26.2020
  - Sponsor: Dr. George F. Haddix President's Faculty Research Fund
  - Submitted: 26-Aug-2020 1:57:16 PM
- Document List:** A table showing document entries:

Form/Document	Document Type	Submitted
<a href="#">Proposal Development Record</a>		26-Aug-2020 1:54:46 PM
<a href="#">Assembled Doc</a>	Budget detail	26-Aug-2020 1:56:41 PM
<a href="#">Bekmuratova Haddix Grant Proposal.pdf</a>	Proposal package	26-Aug-2020 1:56:29 PM
- Add Comments:** A text area labeled "To be shared with everyone" with a rich text editor toolbar.
- Select a decision:** A section with three buttons:
  - Approve
  - Revision needed
  - Will not approve
- Comments I can see...**: A panel showing a comment from "Investigator Creighton" posted on 26-Aug-2020 1:57:27 PM.
- Annotations:**
  - An orange box with an arrow points to the "Comments I can see..." panel, labeled "1. Click here if you chose to view detailed information in the proposal".
  - An orange box with an arrow points to the "Select a decision" buttons, labeled "2. Click here to review a PDF of information entered into the system, including the Proposal Routing Form".
  - An orange box with an arrow points to the "Add Comments" text area, labeled "3. Comments on the proposal can be entered here".

# Approve Proposal

Proposal - Initial Application  
Number: P2100213  
Title: Haddix Test 8.26.2020  
Sponsor: Dr. George F. Haddix President's Faculty Research Grant  
Submitted: 26-Aug-2020 1:57:16 PM

Form/Document	Document Type	Submitted
<a href="#">Proposal Development Record</a>		26-Aug-2020 1:54:46 PM
<a href="#">Assembled Doc</a>	Budget detail	26-Aug-2020 1:56:41 PM
<a href="#">Bekmuratova Haddix Grant</a>	Proposal package	26-Aug-2020 1:56:25 PM
<a href="#">Proposal.pdf</a>		<a href="#">Replace</a>

Add Comments:  
To be shared with everyone

**B** **I** **U** **≡** **≡** **↶** **A** **▼**

Select a decision:

Comments to be shared with PI(s)

**B** **I** **U** **≡** **≡** **↶** **A** **▼**

Comments to be shared with Reviewers

See comments from other reviewers here

Comments I can see...  
Posted By: Investigator Creighton  
26-Aug-2020 1:57:27 PM  
Action Item suppressed by configuration

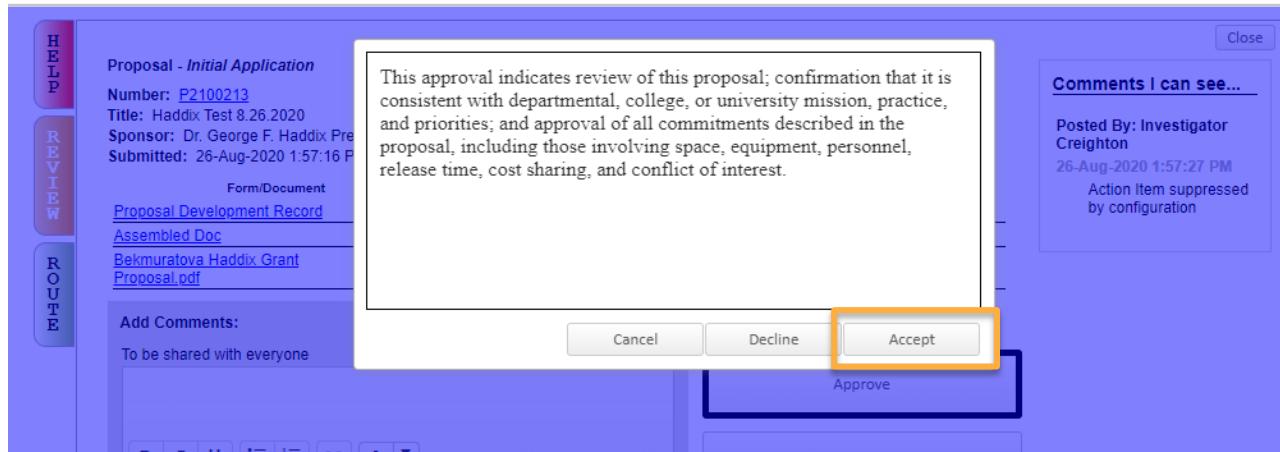
Posted By: Chair Creighton  
17-Sep-2020 4:56  
This is great!

Click “Approve” to approve and send proposal to the next person in the route.

Click “Revision needed” if there are serious errors in proposal that need to be corrected by the PI before you will approve. The route will be paused, and PI will correct the proposal and reroute. **We recommend not using this option—please approve the application and discuss any required changes separately with the PI, add a summary of the issue in the “Comments to be shared with the PI” box, and then approve the application.**

Click “Will not approve” if you do not approve of this proposal

# Accept Final Approval



InfoEd will return to this screen once your approval is complete



This screenshot shows the 'VIEW' tab of the InfoEd software. It contains instructions for performing an online review, including how to see comments, add comments, indicate decisions, and track routing progress. It also provides information about deadlines and how to log in if needed. At the bottom, it lists contact information for SPA Creighton: 2500 California Plaza, Omaha, NE 68178-0390.

You have been identified as someone who needs to perform an On-line Review. The "Review Dashboard" allows you to:

- See Comments" others have made when they reviewed this item
- "Add Comments" to this item
- Indicate "Your Decision" on the Review of this item
- See the "Routing Progress" that this item has/will take

Many of the items being reviewed have deadlines, so please act accordingly. In order to access this information, you will need to be logged in. If you are unsure of your username/password please click [here](#).

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SPA Creighton   
2500 California Plaza  
Omaha, NE 68178-0390

# View Route Progress

HELP

REVIEW

ROUTE

## Active Routing Progress

P2100213 - Investigator Creighton "Haddix Test 8.26.2020"

Route Name	Route Type	Step Number/Name	Who	Notified	Decision	Insert Remove
Internal Programs	Final Review	Step 1 - PI	Investigator Creighton	26-Aug-2020 1:57:27 PM	Approved - Approve	
Internal Programs	Final Review	Step 5 - SPA Approval	Elizabeth Herr	26-Aug-2020 1:58:41 PM	Not Applicable -	
Internal Programs	Final Review		Barbara Bittner	26-Aug-2020 1:58:41 PM	Approved - Approve	
Internal Programs	Final Review		Jennifer Klimowicz	26-Aug-2020 1:58:42 PM	Not Applicable -	
Internal Programs	Final Review	Step 6 - Department(s)	Chair Creighton	16-Sep-2020 3:30:13 PM	Approved - Approve	
Internal Programs	Final Review	Step 7 - School(s)	Dean Creighton	17-Sep-2020 4:56:09 PM		
Internal Programs	Final Review	Step 8 - Inserted Step	Laura Hansen			
Internal Programs	Final Review	Step 8 - Provost Approval	Provost Creighton			
Internal Programs	Final Review	Step 10 - Completion, other	Elizabeth Herr			
Internal Programs	Final Review		Jennifer Klimowicz			
Internal Programs	Final Review		Investigator Creighton			
Internal Programs	Final Review		Barbara Bittner			

**Comments**

Posted By: Investigator Creighton  
26-Aug-2020 1:57:27 PM  
Action Item suppressed by configuration

Posted By: Chair Creighton  
17-Sep-2020 4:56:02 PM  
This is great!

To access this screen after you have closed out of InfoEd, return to the original approval needed email from InfoEd, then click the Route tab

# To access route progress.

The screenshot shows the Creighton University InfoEd portal interface. At the top, there is a blue header bar with the Creighton University logo. Below it is a black navigation bar with tabs: Home, My Profile, Locate My Records, Locate Records, Calendar, Messages (which is highlighted in grey), and Assignments. On the left side, there is a sidebar with links: Sponsored Projects, Financial Tracking, Human Protocol, Conflict of Interest, and SPIN. The main content area is titled "Messages" and shows an "Inbox" dropdown menu and a "New" button. Below the title, there is a list of messages with subject lines: "Approval Required: P2100213", "Approval Required: P2100250", "Approval Required: P2100123", and "Approval Required: P2000120-01". To the right of these messages, there is a column of names: "Creighton, SPA", "Creighton, SPA", "Creighton, SPA", and "Creighton, SPA". An orange arrow points from the text "You can also access the route approval screen inside the InfoEd portal under the Messages Tab" down to the "Messages" tab in the navigation bar.

You can also access the route approval screen inside the InfoEd portal under the Messages Tab

If you have any questions, contact  
Sponsored Programs

[spa@creighton.edu](mailto:spa@creighton.edu)

402-280-3209